



State of Montana Project Management Office

Project Execution and Approval Phase

Change Control Form Instructions

Form for documenting requests to make changes to a project or to a system, product or service being delivered by a project. The forms sections provide space to:

- Describe the change and the reason for making it.
- Describe what the change would affect in terms of project deliverables and documentation, as well as the resources and time required to implement and validate the change.
- Track all the change impacts to completion (major implementation tasks and document updates).
- Officially sign off on the change.

Projects are often plagued by "scope creep". Changes made without review can add to the work of the project and sometimes delay the schedule, increase costs or cause late issues to arise. Companies use change control to make sure the impact of any proposed change to the project definition or specific components of the project (such as hardware or software deliverables, or a business process associated with a service) are thoroughly understood, carefully considered and formally approved in some fashion. The change control form in this template shows the type of information the team should get on a proposed change to fully understand its impact.

Change control usually grows more stringent as a project progresses in order to protect the project against late, disruptive changes.

1. Establish a process by which changes will be proposed and reviewed using the change control form. The process should ensure that proposed changes are reviewed frequently enough to keep the project moving.
2. Customize each section of the form for your project types and project deliverables, i.e., for what the output of your projects is, whether product, system, service, etc.
3. Provide the form to team members and others who might need to submit a change. This form can also be used when you are using contractors or outside firms to do work on your project. In this case, that outside party would be required to provide the information relevant to the work they're performing.
4. Identify who should be involved in reviewing various types of changes. Document that in simple guidelines.

5. After the impacts have been considered, use the bottom portion of the form to document the decision on this change: approved or not, and why. The signature lines at the bottom become the official signoff on that decision.
6. File the change forms as important project records.

Administrative Information

| Revision | Author | Date | Sections Affected | Change Summary |
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